

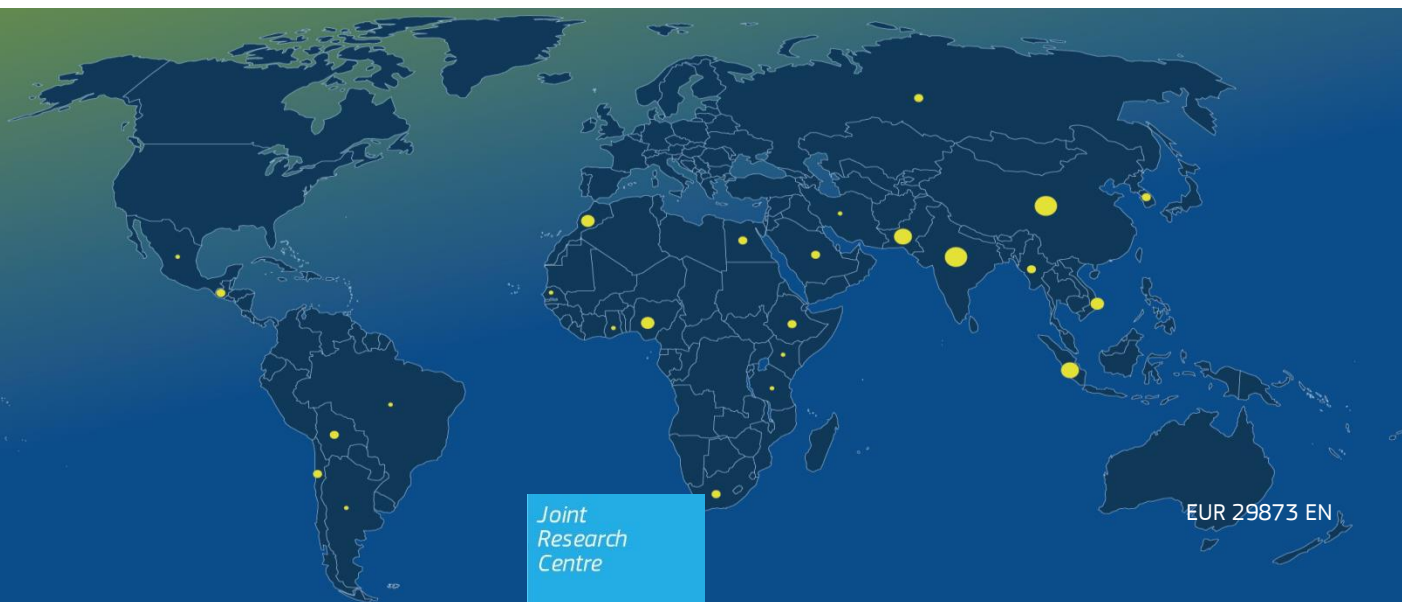
JRC TECHNICAL REPORTS

Emerging new players on the global stage:

How to identify and engage with them?

Approach for discussion – I

2019



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This document is a suggested concept for initial discussion. The work is ongoing. Comments, suggestions and proposals for collaboration are welcome.

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Executive summary

The political priorities¹, set up by the incoming European Commission's President-elect Ursula von der Leyen, have put a clear goal to keep on maintaining Europe as a global champion and to revise its position within the changing geopolitical landscape. To do that, and to position itself correctly amongst the other global players, the EU needs to have access to **holistic country-level information**.

In an increasingly interconnected and globalized world emerging new regional knowledge and power centres question the validity of the established international order. We are witnessing the emergence of multiple and diverse players. The willingness to find mutual interests with emerging global players is the only strategy for a 'win-win' situation within the **multipolar globalisation**.

Advanced developing countries have accounted for almost two-thirds of the world's GDP growth and more than half of new consumption over the past 15 years. Yet their global and regional influence varies substantially among individual countries. The benchmark against the GDP, notwithstanding widely acknowledged limitations, remains heavily embedded in talks amongst governments and interinstitutional meetings. **Assessing country and regional strengths through a new holistic lens²** is a key to determine how to re-engage ourselves within new arising power centres, whether embedded in the knowledge powered economies such as Singapore, or regional champions leading South-South and Triangular cooperation, as Chile.

With the emphasis on new 21st century concerns, new arising global centres of excellence cannot be assessed only through the monetary value of goods and services over a certain time span. There are already many discussions about the shortcomings of the use of GDP as it sidesteps essential dimensions of a fair-society, sustainable development and the real improvement of quality of citizens' lives. Exposure to the effects of globalisation requires institutions to adapt and to facilitate actions on international, national and regional levels, adjusting to the new requirements and adopting regulatory frameworks that support a rapidly changing environment. **The definition of wealth** therefore should be revised by taking into account not only the gross domestic production but also human and natural

¹ https://ec.europa.eu/commission/sites/beta-political/files/political-guidelines-next-commission_en.pdf

² <https://www.rethinkeconomics.org/>

capitals and benefits deriving from these assets. With increasing government spending through procurements for highly specialized services, nowadays the **competition is not just between the governments**, but also **between the businesses that possess strategically needed patents, competences and skills**.

Moreover, in the current globalised and interconnected environment, the issue of **a country's strategic autonomy** encompasses the entire spectrum of foreign policy and security, and not just dimensions of defence or trade, or any other singular element. It is therefore important **to pull together a range of significant indicators and to assess emerging power centres and regional interdependences**, as well as to evaluate critically countries' own strategic autonomy. But **rather than implying autonomy, the notion of balance, dependence and interdependence in the highly interlinked and globalised environment should be looked at**.

In order to **engage meaningfully with the advanced developing countries** and to tailor bilateral and regional relationships it is therefore imperative to review available data and indicators for the sake of advancing policy-relevant knowledge. Such an **interdisciplinary approach would combine existing knowledge with geographical factors** such as location, geo-political interdependence, regional security, human development, economic stability and legal frameworks, as well as sustainability and how it affects the countries global and regional influence. In addition, with inclusion of future scenario modelling and geo-politics, it would allow to **identify game-changing factors** and to **adjust more rapidly to contemporary shifts within the multipolar globalization**, to build forecasts and to anticipate shifts of the entire spectrum of foreign policy relationships with those countries, aiming to promote EU's interests at the global stage. The above is what this study aims to accomplish.

1. Introduction

The new European Consensus for Development³ was adopted in 2017 and is set firmly in the United Nation's 2030 Agenda for Sustainable Development⁴. It also recognises the changes taking place on a global scale and **the need for a differentiated approach and relationship with more advanced developing countries**. These countries can no longer be measured by previous standards. In the evolving global landscape some countries in Southeast Asia (for instance Malaysia or South Korea) and Central Asia (for instance Georgia, Kazakhstan or Uzbekistan) have proved to be politically stable with steadily growing economies. Countries in Africa or Latin America are also developing at a different pace, with different success factors. Such changes imply different opportunities for bilateral or regional relationships between countries or private investors.

The term BRIC⁵ was coined back in 2001 by the economic research division of Goldman Sachs⁶, when the accelerated growth of some emerging economies was surpassing that of the G7⁷ members. At the end of the year 2000, BRIC countries together accounted for about 23.3% of the world's GDP. Their uneven performance, however, calls into question whether the term still reflects reality: by 2017 China's accelerated growth accounted for about a 73% share of the group⁸, but at the same time its GDP *per capita* in 2017 was still approximately similar to the other BRICS⁹. Also, with the new global players in Southeast or Central Asia, one could question whether the term BRICS is still applicable with political processes, governance and societal well-being changing so rapidly. The term itself therefore should be revised to take into account the newly emerging actors in the multipolar globalisation process and their regional and global influence.

The International Panel on Social Progress 2018¹⁰ observed that, due to globalisation, inequality between countries has narrowed since the 1980s. At the same time the macro-level data at country level no longer accurately represents the situation within the country

³ https://ec.europa.eu/europeaid/new-european-consensus-development-our-world-our-dignity-our-future_en

⁴ http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/70/1&Lang=E

⁵ BRIC stands for Brazil, Russia, India, China; in 2010 South Africa joined the group, transforming the acronym into BRICS

⁶ <https://www.goldmansachs.com/insights/archive/archive-pdfs/build-better-brics.pdf>

⁷ G7 countries: Canada, France, Germany, Italy, Japan, the United Kingdom, the United States of America

⁸ <https://www.weforum.org/agenda/2016/09/why-china-is-central-to-global-growth>

⁹ <http://www.statssa.gov.za/wp-content/uploads/2018/11/BRICS-JSP-2018.pdf>

¹⁰ <https://www.ipsp.org/wp-content/uploads/2018/10/IPSP-Executive-Summary.pdf>

where regional inequalities are becoming more noticeable (see also J.N. Pieterse, 2017¹¹, as well as Robert H. Wade, 2011¹², for a critical review). Thus **describing, quantifying and measuring the success of countries remains at the core of discussions among academics and policymakers**. The most frequently used criteria relating to markets, and economic performance expressed in GDP are no longer sufficient to provide a complete picture of country performance. Even if recently produced indices and rankings tend to go beyond GDP and include some additional criteria (like innovation indices, connectedness indices, government effectiveness or country stability), they still focus on a narrow part of people's lives. As is pointed out by alternative rankings, for example the World Happiness Report¹³, there are countries with a lower GDP (like Costa Rica or Mexico) with a higher level of perception of social well-being which is not reflected in GDP measurements but counts in a non-monetary subsistence economy of societal well-being.

In addition, there is a knowledge gap between the perception and application of the principles of sustainability. The widely used and accepted benchmarks of GDP growth and ever-increasing industrial progress do not necessarily imply similar prospects for the long term. Sustainability seems to be perceived as an optional and costly condition, rather than as an opportunity for future job creation and balancing innovation and sustainability. The example of the hazards of accumulated electronic waste, created by technological innovation and increasingly short-term consumerism, could be addressed by more investment in the recycling industry and new job creation. Countries that adopt sustainable development principles are those to be watched for **as potential long-term winners, tapping into new opportunities** of green growth and balancing research, innovation, consumerism, well-being and environmental sustainability ¹⁴. Deriving from the internationally agreed Sustainable Development Goals (SDG)¹⁵, the model of 'doughnut economics' is aiming to offer an alternative 'distributive' and 'regenerative' economic

¹¹ Pieterse, J. N. (2017). *Multipolar Globalization: Emerging Economies and Development*. London and New York: Routledge.

¹² Wade, Robert H. (2011). 'Emerging World Order? From Multipolarity to Multilateralism in the G20, the World Bank, and the IMF'. *Politics & Society*, 39(3), pp. 347–378.

<https://journals.sagepub.com/doi/pdf/10.1177/0032329211415503>

¹³ <http://worldhappiness.report/ed/2018/>

¹⁴ <http://sdgindex.org/>

¹⁵ <https://sustainabledevelopment.un.org/?menu=1300>

approach based on 'thriving instead of growing' and taking citizens' wellbeing as the core of governmental policies¹⁶.

Despite widely acknowledged limitations, the benchmark of GDP remains heavily embedded in talks among governments and at interinstitutional meetings. But with the emphasis on new 21st century concerns, **emerging new players on the global stage cannot be assessed only through the monetary value** of goods and services over a given time span. Multiple and diverse players on the international stage have their own strengths and express differently their assertiveness. There is a need for **different metrics** as well as **new definition and understanding of wealth** and **capabilities**. Moreover, it is not sufficient to look at countries "emergence" factors unless there is an understanding of how these **countries use their powers in the increasingly interdependent environment**. There is a need to assess the country's own capability for **strategic autonomy**, its dependence and interdependence on others, stressing therefore the need to revise and adjust the whole foreign policy spectrum and its impact on internal policies.

To engage meaningfully with the advanced developing countries and tailor bilateral and regional relationships, it is therefore **imperative to review available data and indicators for the sake of advancing policy-relevant knowledge**. Such an interdisciplinary approach would need to combine existing knowledge with geographical factors such as location, regional security, human development, economic stability and legal frameworks, as well as sustainability. In addition, the inclusion of future scenarios, modelling and considerations of geopolitics would make it possible to anticipate game-changing factors and adjust more rapidly to contemporary shifts within the multipolar globalisation.

¹⁶ Raworth, K. (2017). Doughnut Economics: Seven Ways to Think Like a 21st-Century Economist. Hartford: Chelsea Green Publishing

2. Emerging new power centres

In recent decades many developing countries have grown faster than advanced countries, reclaiming their share of the globalised economy and using their cumulative voting power at the UN to form the G77 as a counterbalance to existing power structures. Yet global and regional influence varies substantially between individual countries (see the World Bank report on 'The Changing Wealth of Nations 2018'¹⁷). **Assessing the strengths of these countries and regions** is therefore a key to determine how to reengage the EU within a context of newly arising power centres.

Moreover, it is important to pull together the range of significant indicators and assess emerging new global power centres and regional interdependences, as well as to critically **evaluate countries' strategic autonomy**. Since the 1990s, the general global trend has been to ground global dominance on soft powers like international cooperation, talent attraction and influence through culture. Dr. Joseph Nye, Jr. has coined the term "soft power" in 1990s as "the ability to obtain preferred outcomes by attraction and persuasion rather than coercion and payment"¹⁸. He rightly anticipated¹⁹ that the diffusion of power will pass from governments to non-state actors ranging from large corporations to non-profits and to informal ad hoc groups and that the third, "smart power", a combination of hard and soft approaches, will emerge. The decade between 2000 and 2010, indeed, witnessed 'the inevitable return to rivalry'²⁰ and the increase in the use of 'terrorism' as a key word in major foreign policy documents²¹. Since 2015 the trend towards assertiveness has been reflected in risk mentioning from increasing disruptions of the Fourth Industrial Revolution, technological advancements and national strategies aimed at renewal of military capabilities²².

¹⁷ The World Bank "The Changing Wealth of Nations 2018"
<https://openknowledge.worldbank.org/handle/10986/29001>

¹⁸ Nye, J. S. (1990). Bound to lead. Basic Books.

¹⁹ Nye, J.S. (2011). The Future of Power. PublicAffairs.

²⁰ Brookings Institution think tank: <https://www.brookings.edu/opinions/the-return-to-great-power-rivalry-was-inevitable/>

²¹ "Our World in real time". Access GDELT 2.0 in Google BigQuery: Events, Mentions, Global Knowledge Graph. <https://blog.gdeltproject.org/gdelt-2-0-our-global-world-in-realtime/> and "Open Repository Base on International Strategic Studies" ORBIS <https://espas.secure.europarl.europa.eu/orbis/>

²² "Our World in real time". Access GDELT 2.0 in Google BigQuery: Events, Mentions, Global Knowledge Graph. <https://blog.gdeltproject.org/gdelt-2-0-our-global-world-in-realtime/> and "Open Repository Base on International Strategic Studies" ORBIS <https://espas.secure.europarl.europa.eu/orbis/>

The third "smart" power now combines innovation, information, access and outreach, and uses a combination of soft and hard power skills to assert autonomy, position and regional influence. Moreover, military and defence capabilities, combined with research and innovation capacities deriving from the human capital assets, are pointing to the **new emerging technological hubs and centres of innovation**. The 2019 GSMA mapping²³ pointed to the emerging innovation quadrangle in Africa: Nigeria (with 85 active tech hubs), South Africa (80 active tech hubs), Egypt (56 active tech hubs) and Kenya (with 50 active tech hubs). This would confirm the emergence of new tech hubs combining unique technical and economic power as a result of the available human capital and an enabling environment. Multinationals and innovative companies will soon hold a greater role in countries' strategic autonomy while at the same time governments globally tend to outsource specialised technological or innovation capabilities to private firms (one example could be the US National Defence Strategy²⁴ and budget allocation 2019²⁵ that point to increased spending on procurement and RDT&E, research, development, test, and evaluation). **The competition is not just between states and their governments, but also between private companies possessing strategically needed patents, competencies and skills.**

Though the focus on smart power started in the developed countries, it does not exclude the Global South. Some of the emerging economies like India, Ethiopia, Pakistan, Turkey, Saudi Arabia and Uganda²⁶ are currently rapidly renewing their military equipment and investing in hard power. For example, Bangladesh is implementing its forward looking Forces Goal 2030 roadmap²⁷, aimed at renewing its military capacities given its geopolitical situation and proximity to India, Pakistan and China. The growing regional influence of the emerging economies and advanced developing countries cannot be ignored.

Meaningful criteria to assess country-level performance should be pulled together for an impartial and inclusive overview that allows a critical assessment of their own strength, strategic autonomy and dependence on others

²³ <https://www.gsma.com/mobilefordevelopment/blog/618-active-tech-hubs-the-backbone-of-africas-tech-ecosystem/>

²⁴ <https://dod.defense.gov/Portals/1/Documents/pubs/2018-National-Defense-Strategy-Summary.pdf>

²⁵ <https://www.cnas.org/publications/reports/overview-of-the-2019-presidents-budget-request-for-defense>

²⁶ <https://www.globalfirepower.com/countries-listing.asp>

²⁷ <https://thediplomat.com/2018/01/bangladeshs-ambitious-military-modernization-drive/>

in an increasingly interconnected and globalised environment. Strategic autonomy especially should be defined and clearly understood as an issue going beyond the economic or defence spheres, and encompassing the entire spectrum of foreign policy, based on soft, hard and smart power tools. The economic dimension, as part of 'hard power', should be assessed through an interdisciplinary approach combining sociology, environment, science²⁸ and innovation capabilities, combining multiple indicators, beyond aggregated GDP figures. In any case, the GDP does not reflect a country's reality, due to differences in urban and non-urban living standards as a result on increasing inequalities within the same country's boundaries²⁹.

Comprehensive and inclusive country-level information is thus the only way to position the EU correctly amongst the other global players and to "ensure that we uphold and update the rules-based global order".³⁰

²⁸ <https://www.scimagojr.com/countrygraph.php>

²⁹ Pieterse, J. N. (2017). *Multipolar Globalization: Emerging Economies and Development*. London and New York: Routledge.

³⁰ A Union that Strives for More, My Agenda for Europe, Political Guidelines for the Next European Commission 2019-2024, p.17. https://ec.europa.eu/commission/sites/beta-political/files/political-guidelines-next-commission_en.pdf

3. Multiple indicators for a comprehensive assessment *(how to identify emerging powers?)*

Many existing indicators provide sector specific information, which only partially capture the situation and are being re-examined taking into account the changing needs. For instance, the Human Development Index, a combination of life expectancy, education and per capita income and which was proposed in 1990s, has recognized own limitations and is undergoing a review with the aim to include more of what the human development entails."³¹

Therefore identifying emerging players on the rapidly evolving global stage can be done only through a comprehensive country-level performance assessment through multiple indicators and taking into account:

- socio-economic factors,
- human and natural capital,
- military and defence capabilities, and
- an enabling environment.

The corresponding indicator families mentioned above must be reviewed through the lens of competitiveness and strategic autonomy, assessing the global money flows from private and governmental bodies and considering geopolitical influences and interests.

Table 1. Graphical presentation of proposed concept



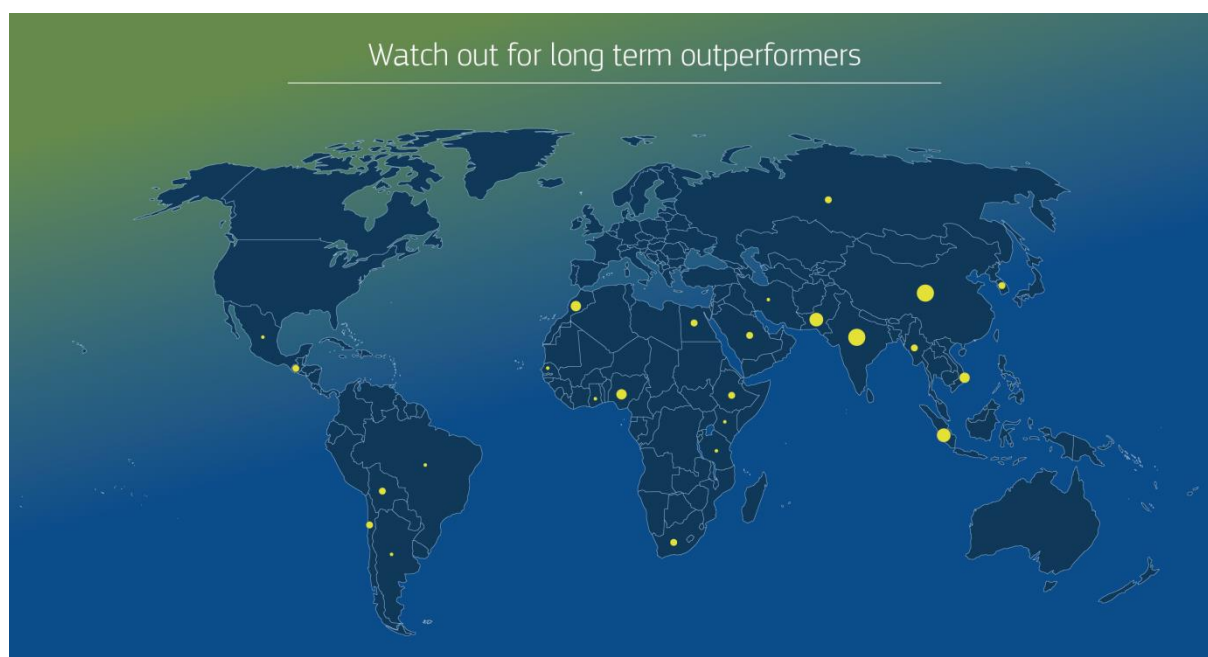
³¹ <http://hdr.undp.org/en/content/human-development-index-hdi> (accessed online, October 2019)

Methodology

It is proposed to address the issue through the quantitative and qualitative approaches:

- *Interdisciplinary composite index building* → Composite indicators would provide a quantitative and measurable overview of the country level performance based on predefined indicators that are selected in line with the new economic thinking. Relationship and interdependence measurement will be the distinguishing feature of this assessment part.
- *Horizon scanning and trend impact analyses* → as developed by the Millennium Project research team, suggesting multiple levels of differentiated research methodologies³².

Table 2. Results from initial JRC assessment through the multilayer inclusive assessment criteria (ongoing elaboration, not finalised yet)



Any interpretation of the results should be assessed from the angle of the question posed. In many cases the average country-level performance results can be totally changed if a 'per capita' criterion is added or if urban and non-urban country-level disparities are factored in. The distinction should therefore be made and the final results should be

³² <http://www.millennium-project.org/publications-2/futures-research-methodology-version-3-0/>

presented from multiple perspectives, allowing policymakers to better understand the situation.

The driving forces are defined as the internal or external factors that directly influence the country-level performance. Internal driving forces would look at broader factors of the human development, population, urbanisation, education, skills, competencies and innovation, etc. External driving forces would look at country-level performance from the human geography aspects, regional location, social and political trends, in-migration, financial capital flows, economic conditions and interdependence, etc.

For this reason, a mere numeric compilation of various indicators, data and figures is not in itself sufficient to understand the actual situation on the ground or to tailor bilateral and regional relations. One must therefore assess together the driving forces and influences behind aggregated numbers.

The traditional approach to development tends to emphasise public funding and focus on donors' impact on a country's development strategy. By contrast, a business and market-friendly approach focuses on creating the legal and governance structures where entrepreneurship and innovation build upon the availability of human, intellectual and natural resources, which in turn empower internal agents to maintain and drive forward the process themselves. The assessment criteria and indicators that we will propose will be chosen for their ability to reveal and measure a country's own capacity to put forward and implement the necessary reforms.

In addition, partnerships and networks can provide insight into countries' own ability to form alliances and spheres of influence. The accumulated experience, local practices and knowledge are better shared with regional neighbouring partner countries that face similar challenges, making therefore South-South development solutions as a valuable complementary tool to existing North-South development cooperation. The scaling up of Triangular cooperation, when traditional donors support South-South cooperation through financial or technical or knowledge transfer means is another way to foster local capacities.

The mapping of South-South and Triangular cooperation projects (OECD³³, 2018 project data) reveals new emerging power centres and a changing landscape of international development cooperation.

Table 3. South-South and Triangular cooperation network (SST project database, OECD, 2018)



³³ <http://www.oecd.org/dac/dac-global-relations/triangular-co-operation-repository.htm>

4. Interdependence and strategic autonomy *(How to rethink relationships in a changing world order?)*

The emergence of new global actors has shifted the international order so far dominated by the 'Global North'. The concept of strategic autonomy is linked to the broader ambition of the EU as a global actor, aiming to defend vital interests: security, prosperity and democracy. **Rather than implying *autonomy* in the sense of insulation from external dependencies, the notion of *balance*, dependence and interdependence in the highly interlinked and globalised environment of today is what is required.**

It is imperative to assess global Foreign Direct Investment (FDI) flows and their relation to the Official Development Assistance (ODA) flows, to specify a country's interests, destinations and purpose. The balance between dependence from external interest and incoming support combined with its own internal capabilities and projected foreign relations strategy is delicate and one which determines a country's strategic autonomy and interdependence in globalized world (*see graphics in the following pages*).

Table 4. Initial assessment of India's FDI interests (in and out flows, as well as balance, WB data 2012)

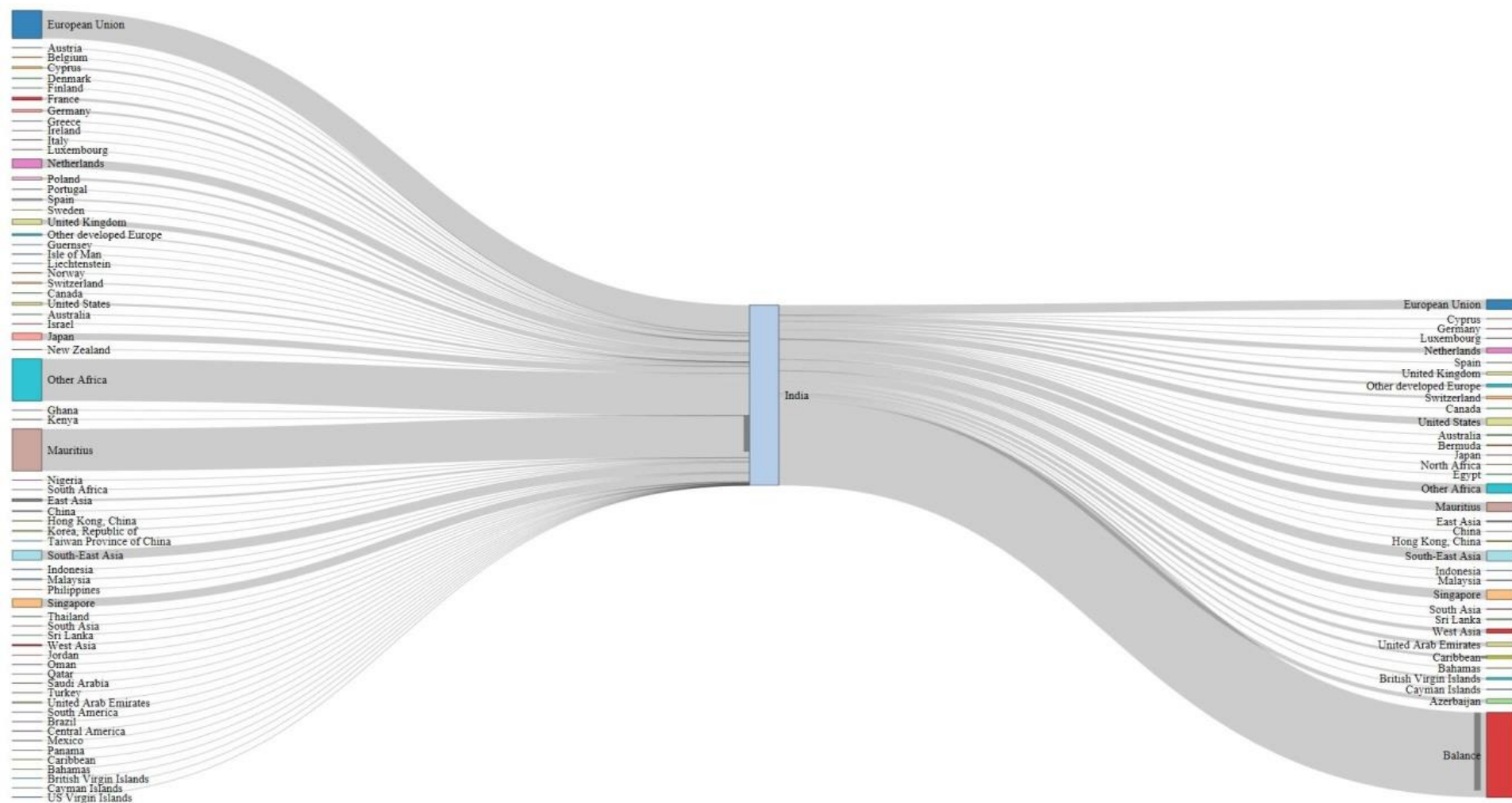
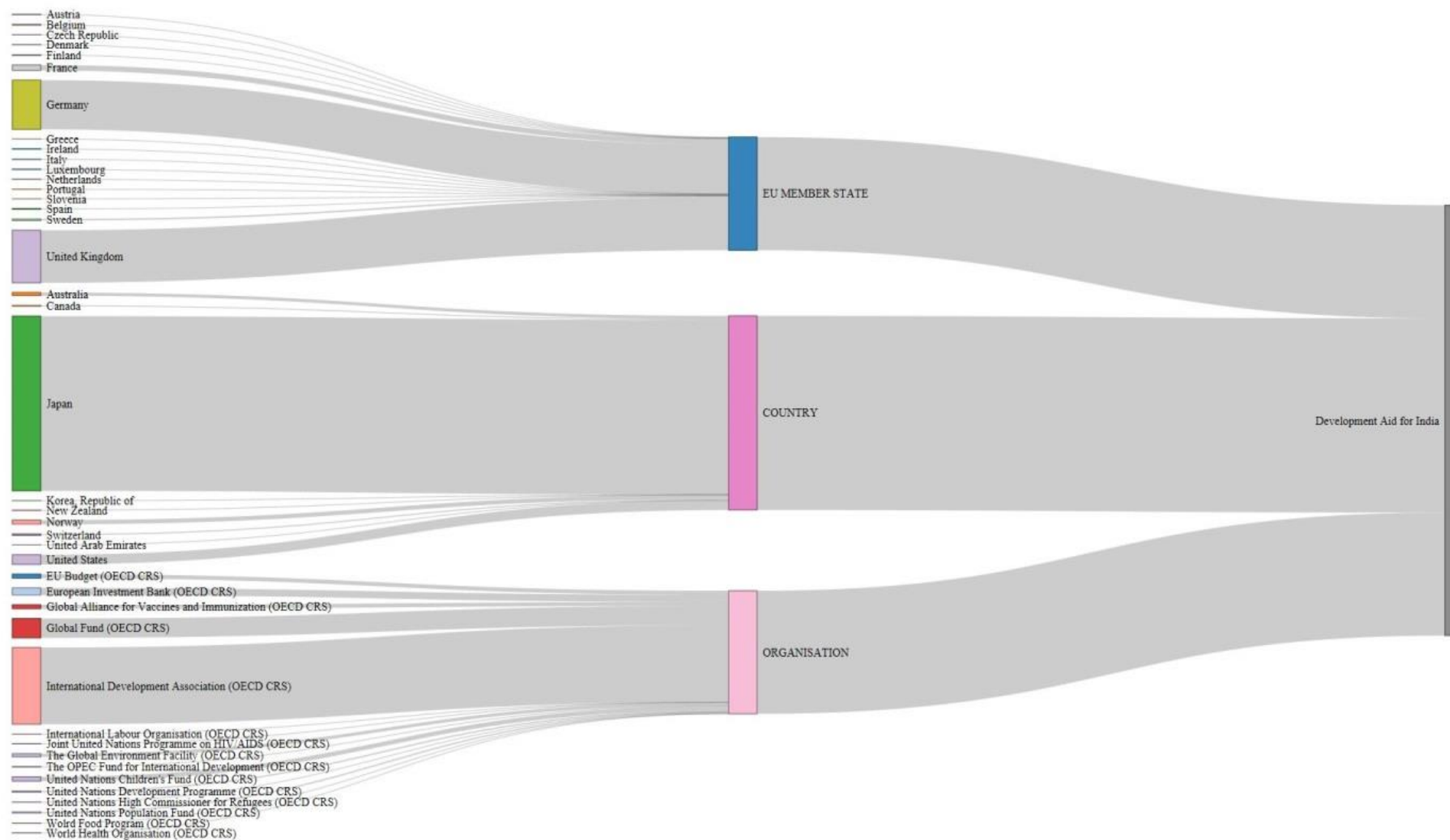
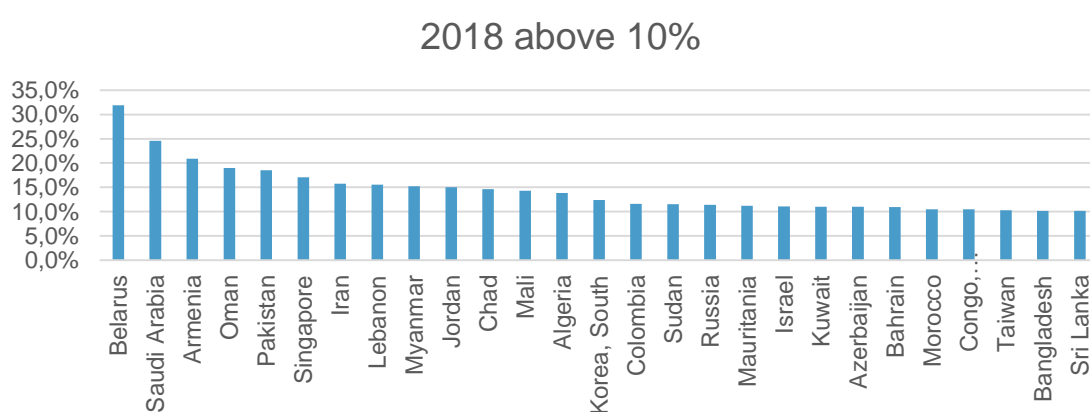


Table 5. Initial assessment of ODA flows to India, (OECD data 2012)



A strategic choice of instruments employing coercion or persuasion distinguishes a country's ability to affirm its presence through the use of soft and hard powers. While hard power is exercised through military presence, economic sanctions and monetary influence, soft power uses appeal and attraction, through international cooperation mechanisms, cultural and educational influence, language learning opportunities, tourism, talent attraction, gender balance as a cross-cutting issue, good governance and democracy. The decisions made reflect the underlying political priorities and guiding philosophical beliefs. As an example, since 2013 Costa Rica's constitutional abolition of its army has received an honourable mention by the World Future Council³⁴ and was recognised as one of the few states that have diverted the governmental spending for improvement of environment, education and health. In May 2019 New Zealand has announced its government's budget alignment³⁵ with the transformative economy priorities, focusing on citizens' wellbeing, communities, inclusiveness, fairness and environmental concerns, instead of prior economic growth indicators. Consideration of internal policies and own society's benefits comes together with external policy alignment. In the case of New Zealand for example, well negotiated free trade agreement with China also works for the benefit of the country. The indicators we choose should therefore match our intention to assess countries' interest in and care about their own population through internal and external drivers.

Table 6. Government spending for military purposes as % of the total government budget (SIPRI, 2018)



³⁴ <https://www.worldfuturecouncil.org/>

³⁵ <https://budget.govt.nz/budget/pdfs/wellbeing-budget/b19-wellbeing-budget.pdf>

The analyses should be completed with the World Bank's 'Doing Business' data³⁶, as well as considering countries' legal framework and the rule of law, labour, social protection and general human rights framework (by OHCHR)³⁷ as well as the Global Conflict Risk Index³⁸ done by the JRC of the European Commission.

³⁶ <https://www.doingbusiness.org/>

³⁷ <http://indicators.ohchr.org>

³⁸ <https://ec.europa.eu/jrc/en/peace-and-stability/projects/gcri>

5. Future steps

The concept hereby introduced suggests taking into account multiple criteria when assessing a country's performance level and determining the delicate balance between external forces and its own internal capabilities. The prevalent thinking follows the lines of post-Keynesian economics, with the aim of preparing government policies that work for people and the planet, should influence the selection of indicators and the assessment criteria.

The next steps will be discussed in a workshop with invited internal and external experts. Participation will be decided with the aim of balancing geographical distribution and previous expertise in rethinking economics, taking into account EU policy interests. The workshop will aim to develop a multidimensional concept of assessing country-level information through a holistic approach on the basis of participatory methodology which will bring together practitioners, academics and policymakers as co-researchers.

Discussion will focus on:

- the proposed concept of a holistic 'lens' through which to review country-level information;
- the relevant existing knowledge;
- the inclusiveness of the various elements to be taken into consideration;
- availability of the most suitable sources of data and indicators;
- matching data and indicators with the guiding principles of the new line of economic thinking.

The suggested "*first approach for discussion*" will be revised into a new document and will serve as a basis to elaborate the methodology and technical specifications of the interdisciplinary composite index and interdependence relationship.

The extensive review of available data and indicators will be done to make sure their emphasis is aligned with the strategic line of 'an economy that works for people and the planet'. **Choosing the right metrics that reflect and match the ultimate goals is a**

must in this process that strives to align theory, practice, reporting and monitoring. Consensus building through the real-time Delphi methodology³⁹ is the most efficient way to collect and synthesize expert opinions.

To align and validate the methodology and data, a number of in-depth case studies will be performed on preselected countries of interest from policy DGs (according to currently used available indicators, though not yet fully aligned):

- selected outperforming upper-middle income countries, like Brazil, South Korea, Mexico, Colombia, Turkey, Thailand, Saudi Arabia, Malaysia and South Africa;
- selected countries with a clear positive trend over the last years, as Indonesia, Nigeria, Pakistan, Philippines, Vietnam, Ukraine, Bangladesh, Morocco, Ethiopia, Tajikistan, Sri Lanka, Tanzania, Guatemala and Bolivia;
- comprehensive in-depth case study analyses of a few selected fragile countries⁴⁰ (some of them through qualitative case study examples).

Following the preparatory stage of validation of the concept, a separate project will be defined to operationalise such emerging power monitoring capacity.

Seeking to use verified and timely available SDG-related data, deriving from robust methods and quality assurance controls, we will look at the outcomes from the *Data For Now*⁴¹ initiative, anchored by four operating partners: the Global Partnership for Sustainable Development Data, the World Bank, the United Nations Statistics Division, and SDSN TRENDS.

³⁹ <http://www.millennium-project.org/rtd-general/>

⁴⁰ <https://ec.europa.eu/jrc/en/peace-and-stability/projects/gcri>

⁴¹ <http://www.data4sdgs.org/data4now>

References

To facilitating reading, all references are inserted as footnotes in the main text.

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